Client Engagement Roadmap

January – March, Scheduled Activities

1 Data Gathering
2 Document Review
3 Prioritize Goals and Objectives
4 Present Financial Vision
5 Present Key Recommendations
6 Introduce Roadmap
7 Ed: Benefits of Consolidation

April – June, Scheduled Activities

1 Review Financial Vision
2 Review Goals
3 Roadmap Review
4 **Asset Allocation Review**
5 **Investment Review**
6 Ed: Estate Planning

July – September, Scheduled Activities

1 Review Financial Vision
2 Review Goals
3 Roadmap Review
4 **Estate Planning Overview**
5 **Trusts and Taxes**
6 Ed: Corporate Holdings

October – December, Scheduled Activities

1 Review Financial Visison
2 Review Goals
3 Roadmap Review
4 **Corporate Tax and Transition**
5 **Corporate Holdings Strategies**
6 Ed: Insurance

January – March, Scheduled Activities

1 Review Financial Vision
2 Review Goals
3 Roadmap Review
4 **Insurance Overview**
5 **Insurance Options**
6 Ed: Market Overview

April – June, Scheduled Activities

1 Review Financial Visison
2 Review Goals
3 Roadmap Review
4 **Asset Allocation Review**
5 **Investment Review**
6 Ed: Trips and Toys

July – September, Scheduled Activities

1 Review Financial Vision
2 Review Goals
3 Roadmap Review
4 **Vacation Planning and Budget**
5 **Toys and Major Entertainment**
6 ED: Retirement Budget

October – December, Scheduled Activities

1 Review Financial Vision
2 Review Goals
3 Roadmap Review
4 **Budget for Retirement**
5 **Review of Planned Expenditures**
6 Ed: What's Important to You!